



OCLC WorldShare® Interlibrary Loan: Borrowing

Creating an account

You will need to create a new user name and password, using your 9-digit authorization number and password for WorldCat® Resource Sharing. Please see [Getting Started with OCLC WorldShare® Interlibrary Loan](http://www.oclc.org/content/dam/support/worldshare-ill/documentation/WorldShare-ILL-getting-started.pdf), at <http://www.oclc.org/content/dam/support/worldshare-ill/documentation/WorldShare-ILL-getting-started.pdf>, for instructions on creating an account and preparations for migration.

Navigating the system

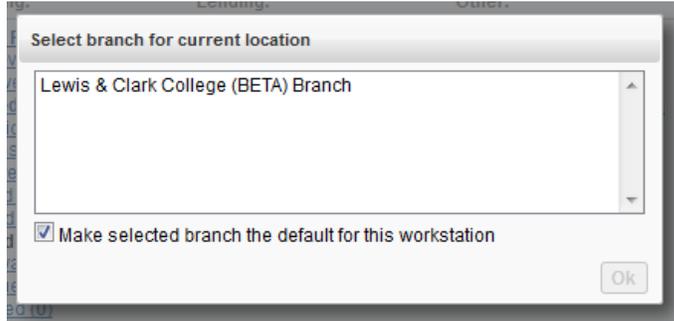
Please do not use the browser Back button. Instead, click a link on the screen to return to a previous page.

Accessing the WorldShare ILL system

To access the site, go to the custom URL you bookmarked after creating an account.
Note: For questions, please contact OCLC Support at support@oclc.org.



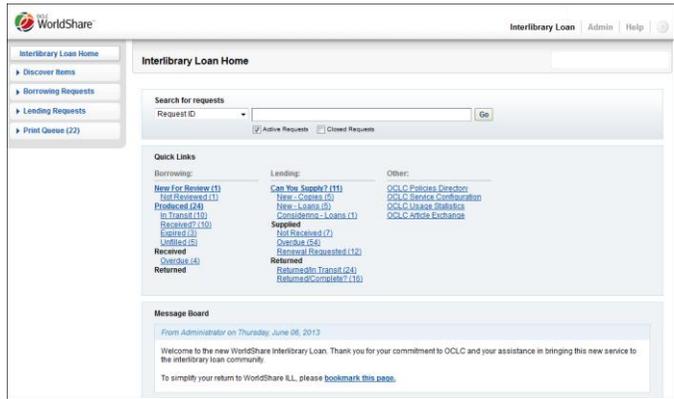
You may also see a branch selection pop-up window. Select your branch and click **OK** to proceed.



The Home screen lists all of your borrowing and lending requests, a search option for finding requests, and the ability to search WorldCat and create requests.



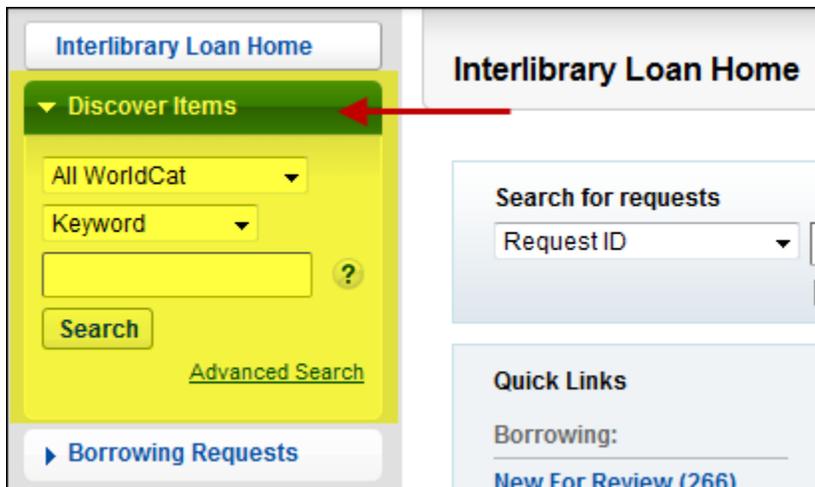
You will be directed to WorldShare Interlibrary Loan (there may be a slight delay before the screen refreshes).



Creating requests

Discover Items to create requests

You may search for items and create a request under **Discover Items** in OCLC WorldShare Interlibrary Loan.



To discover items:

Step	Action
1	For a basic search, choose the type of search from the drop-down lists. Or see Advanced Search .
2	Type your search terms in the box provided.
3	Click Search . Matching results appear, along with holdings display options.

- 4 On the Results screen, display holdings by clicking **State Holdings**, **Regional Holdings** or **All Library holdings**. **Optional:** Click **Go** (in the right column) to see results for **All Library Holdings**, or filter by **Custom Holdings**, **Year** or **Volume**.

The screenshot shows the search results for 'zen shorts'. Two items are listed:

- Item 1:** 'Zen shorts' by Jon J. Muth, Book, English, 2005. Holdings: State Holdings, Regional Holdings, All Holdings (3282).
- Item 2:** 'Zen shorts' by Jon J. Muth, David Pittu, Scholastic Audiobooks, 2010. Holdings: State Holdings, Regional Holdings, All Holdings (113).

Red arrows point to the 'All Holdings' links and the 'Go' button in the filter section.

- 5 On the Holdings screen, view detailed holdings information by clicking a library name. Click **Yes** to add a Supplier to your lender string. Click the **i** logo to go the **OCLC Policies Directory** to confirm a lender's policies. Then click **Create Request**. **Optional:** Click the library name to go to the library's online catalog. This link is maintained in the WorldCat Registry, <http://www.worldcat.org/registry/Institutions>. In the Registry, you are able to configure your OPAC to provide deep links to the specific OCLC number or other identifiers.

The screenshot shows the Holdings screen for 'zen shorts'. It displays a table of holdings with columns: Library, Supplier, Location, Symbol, Group, Cost, Holdings.

Library	Supplier	Location	Symbol	Group	Cost	Holdings
A H MEADOWS LIBR	-	US, TX	TXAHM			
ABILENE CHRISTIAN UNIV, BROWN LIBR	-	US, TX	TXC			
ABILENE PUB LIBR	Yes	US, TX	TXB			

A red arrow points to the 'Create Request' button.

- 6 Apply your constant data record.

The screenshot shows the 'Request Details' screen for 'zen shorts'. It includes fields for Title, Author, Publisher, ISBN, OCLC, DOI, PMID, Type, Format, and Edition. A red arrow points to the 'Apply constant data' button, which is set to 'DEFAULT'.

7 On the workform screen, provide a **Needed By:** date (required).

The screenshot shows the 'Request Details (Request ID NEW)' section of the workform. The 'Needed By' field is highlighted with a red circle and a red arrow pointing to it. The field contains the date '07/17/13'.

8 Under **Borrowing Library**, the **Address** field is required for both **Shipping** and **Billing**.

The screenshot shows the 'Borrowing Library' section. The 'Address' field is highlighted with a red arrow. The address entered is '123 Oakberry Blvd'. Other fields include 'Ship To: ILL department', 'City: Denver', 'State/Province: Colorado', 'Country: United States', 'Postal Code: 12345-1111', 'Ship Via: USPS', 'Fax/Phone: 123-456-4444', and 'Email: corsl@oclc.org'.

9 Under **Lending Libraries**, lender policies are listed for any lenders you chose on the Holdings screen.

The screenshot shows the 'Lending Libraries (AMP, TLMX)' section. The 'Lender String' field is highlighted with a red box and contains 'AMP, TLMX'. Below it is a table with columns 'Lender', 'Cost', and 'Shelf Status'.

Lender	Cost	Shelf Status
Mobile Public Library AMP Mobile Public Library, Mobile, US-AL	Copies: 0.00 USD Loans: 0.00 USD	Unknown Libran Home

Below the table is a legend:

- Item is available (green checkmark)
- Item is not available (red X)
- Shelf status unknown (triangle with exclamation mark)

To add more lenders, type the institution symbol(s) of up to 15 of your preferred lender(s) in the Lender String field, separated by commas.

10 **Optional:** Provide **Patron** information.

11 **If applicable,** direct notes and supplier history, including reasons for no, will appear under **Request History**.

The screenshot shows a sidebar on the left with various request status filters: Conditional (1), In Transit (7), Not Received (2), Unfilled (18), Received? (3), Received (51), Received/In Use (38), Renewal Requested (2), Renewal Approved (1), and Overdue (39). The main content area shows a list of request details for Request ID 101631503, including Lending Information (Supplier: NDT7P), Borrowing Library (NDCLV), and Patron (user 1). The 'Request History' section is expanded, showing 'Direct Notes' (No profiles exist) and a 'Supplier History' table.

Date	Lender	Response
2013-03-07	NDT7P	In Transit

12 Click **Send Request**. A confirmation message appears and the request appears under the category **Borrowing Requests > Produced > Awaiting Response**.

The screenshot shows the 'Interlibrary Loan Home' page. On the left, there is a search section with 'Discover Items' and filters for 'All WorldCat', 'Keyword', and 'zen shorts'. The 'Send Request' button is highlighted with a red arrow. The main content area shows the details for 'Zen shorts', including 'Request Details (Request ID NEW)', 'Lending Libraries', 'Borrowing Library', 'Patron', 'Request History', and 'Buy It Options'. There are also buttons for 'Send Request', 'Save For Review', 'Apply constant data: DEFAULT', and 'Reset'.

Note: If you wish to save the request to submit in the future, click **Save For Review**.

Advanced Search

From the **Discover Items** option, click **Advanced Search** to see the Advanced Search screen:

With advanced search you can:

- Use multiple search boxes to do Boolean operators searches
- Use more Index types than basic search allows

Search by these additional criteria:

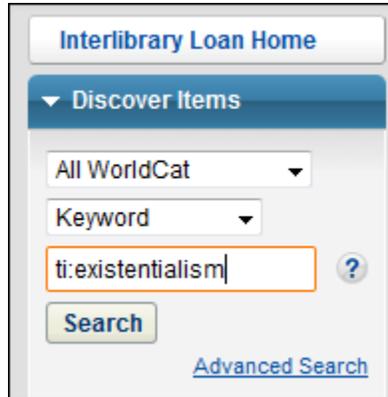
Criteria	Description
Format	The format of the item for which you are performing the advanced search. <i>Examples:</i> book, audiobook
Language	The language of the item.
Year(s)	The years of publication. <i>Example:</i> single year (1980)
Source of Cataloging	Whether or not the item was cataloged by the Library of Congress.
Language of Cataloging	Language in which the item was originally cataloged.

To perform an advanced search:

Step	Action
1	Limit your search to: <ul style="list-style-type: none"> • My Library Holdings: searches for records in your local holdings. • Group Holdings: searches for records in your group's holdings. • All WorldCat: searches for records in WorldCat.
2	Select one of the index types .
3	Based on the index type selected, enter the appropriate text in the search box.
4	Select up to three combinations of boolean operators (below) and index types, and search text by clicking the plus sign (+) to add additional form fields.
5	Fill out the remaining search form fields: <ul style="list-style-type: none"> • Format • Language • Year(s) • Source of Cataloging • Language of Cataloging

Expert Search

Expert searching is when you perform a complete, full text search in a single string. Expert searches consist of a combination of an index label and search terms. These combinations can be lined by **boolean operators** that are capitalized (AND, NOT, OR). Enter an expert search in the Basic search text box:



Types of indexes:

Type	Description
<p>Word</p> <p><i>examples:</i> au: su: ti:</p>	<p>A word search typically uses a combination of an index label, a colon (:), and a single complete word that is contained anywhere in the item's record, including: titles, notes, abstracts, summaries, descriptions and subjects.</p> <p>When entering a keyword search, you can enter the word in uppercase or lowercase.</p>
<p>Word phrase</p> <p><i>examples:</i> au= se= ti=</p>	<p>A word phrase search typically uses a combination of an index label, equal sign (=) and multiple complete words that are contained anywhere in the item's record, including: titles, notes, abstracts, summaries, descriptions and subjects.</p> <p>When entering a phrase search, you can:</p> <ul style="list-style-type: none"> • Enter words in uppercase or lowercase. • Enter multiple words in any order.
<p>Number</p> <p><i>examples:</i> gn: bn: in: nl:</p>	<p>A numeric search typically uses a combination of an index label, a colon (:) and numbers that are contained in the item's record.</p> <ul style="list-style-type: none"> • For numbers only, use a colon (:) • For number phrases, use an equal sign (=) • In class number searches: <ul style="list-style-type: none"> ○ Include periods. Example: dd:616.46 ○ Omit all other punctuation in class numbers ○ Omit spaces
<p>Number phrase</p> <p><i>examples:</i> bn= in= nl=</p>	<p>A numeric phrase search typically uses a combination of an index label, an equal sign (=) and numbers that are contained in the item's record.</p> <ul style="list-style-type: none"> • In class number searches: <ul style="list-style-type: none"> ○ Include periods. Example: dd:616.46 ○ Omit all other punctuation in class numbers ○ Omit spaces

Boolean operators

Use Boolean operators to combine search terms.

Operator	Description	Examples
AND	Finds all term anywhere in a record.	woman AND history AND 1970-
OR	Finds any single term or all terms.	woolf, virginia OR woolf, leonard AND 1900
NOT	Excludes the term that follows NOT.	civil war NOT battle NOT united states

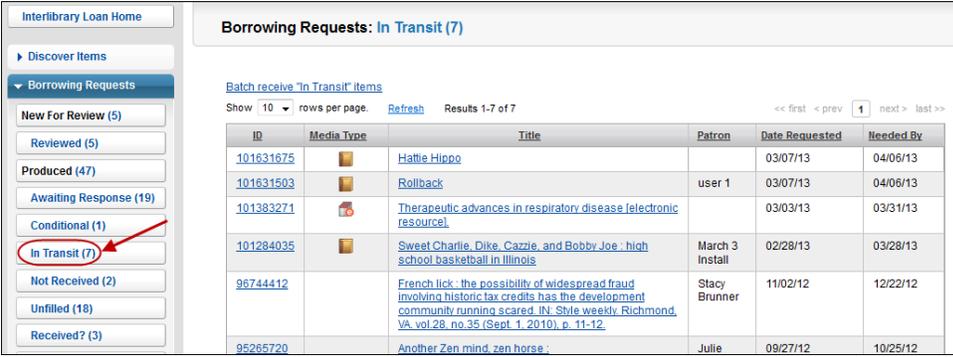
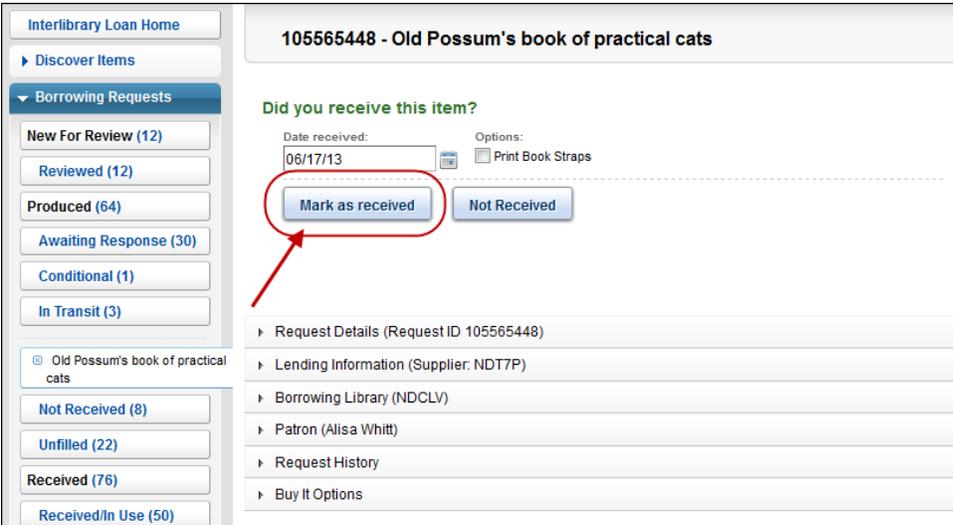
Managing requests

Your requests appear in the left navigation menu, and under **Quick Links** on the Home screen. The main categories are listed first, followed by sub-categories for easier organization. Click a category to see all requests in that category.

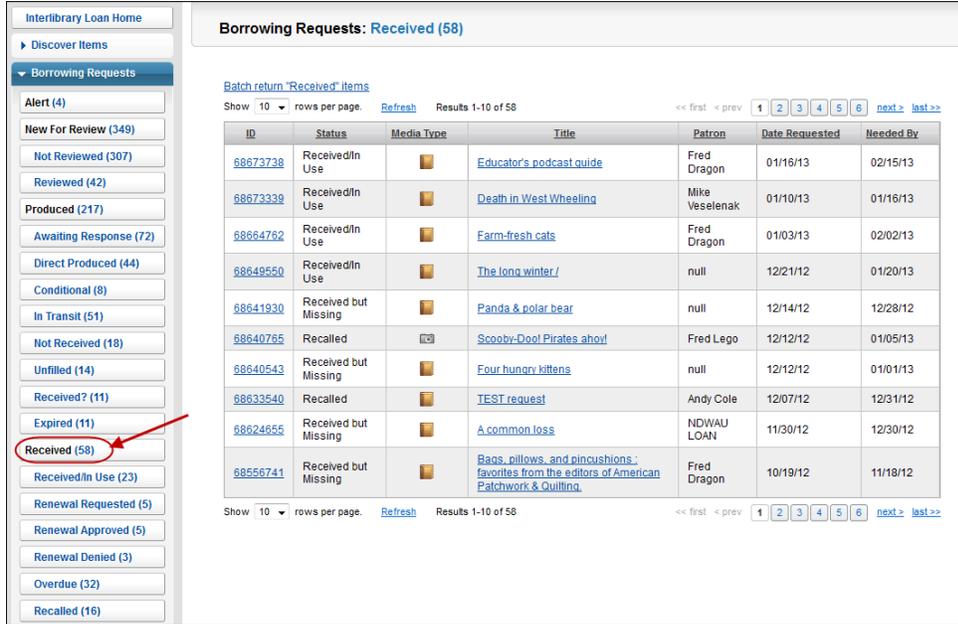
Note: Categories with no current requests will not appear in the list.

The screenshot shows the OCLC WorldShare Interlibrary Loan Home interface. On the left, a navigation menu is visible with the following items: Interlibrary Loan Home, Discover Items, and a dropdown for Borrowing Requests. The Borrowing Requests dropdown is expanded, showing a list of categories: New For Review (1), Not Reviewed (1), Produced (24), Awaiting Response (6), In Transit (10), Unfilled (5), Received? (10), Expired (3), Received (4), Received/In Use (3), Renewal Requested (1), Overdue (4), Returned (1), and another Returned (1). A 'Create Request' button is at the bottom of the menu. On the right side of the page, there is a search box for requests, a Quick Links section with a 'Borrowing:' sub-section containing links to the same categories as the menu, and a Message Board section.

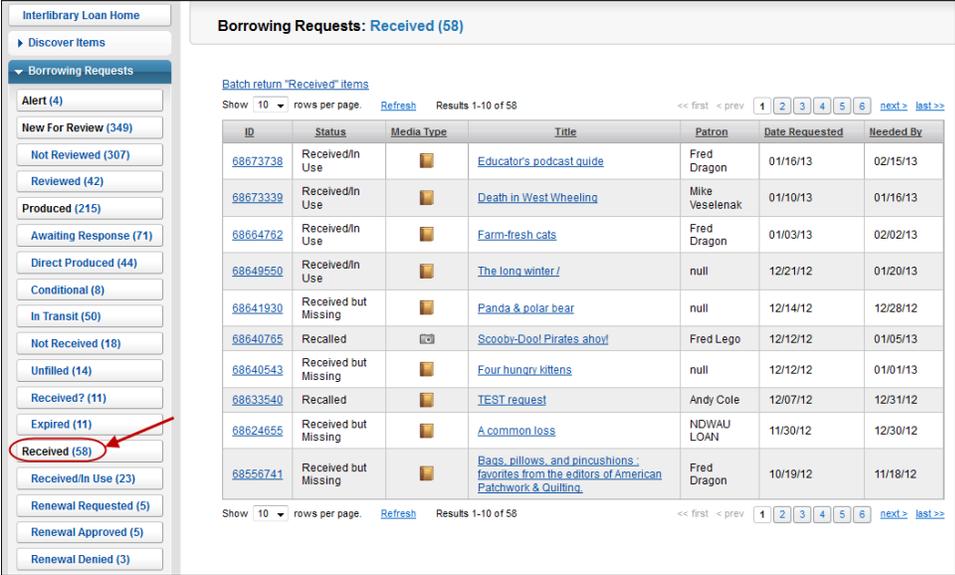
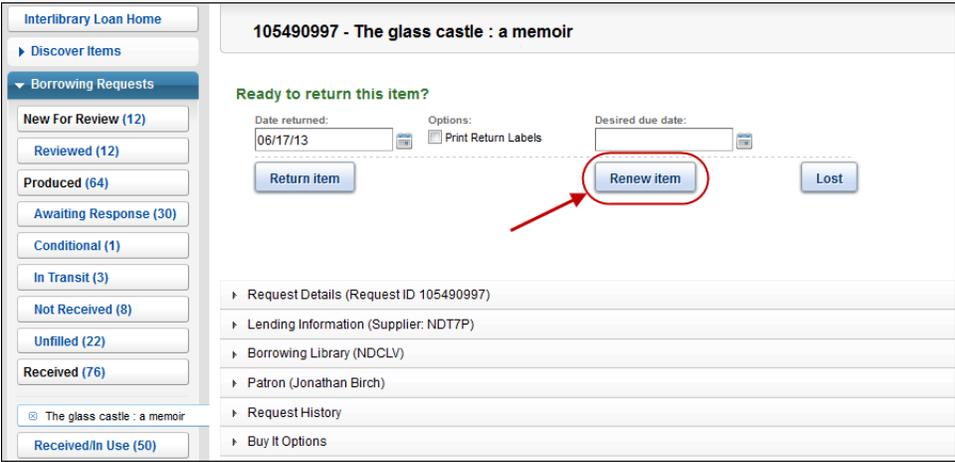
Receive items (from In Transit status)

Step	Action																																										
1	<p>From the Borrowing Requests category, click In Transit. Click the request ID or Title to display a request.</p>  <table border="1"> <caption>Borrowing Requests: In Transit (7)</caption> <thead> <tr> <th>ID</th> <th>Media Type</th> <th>Title</th> <th>Patron</th> <th>Date Requested</th> <th>Needed By</th> </tr> </thead> <tbody> <tr> <td>101631675</td> <td>Book</td> <td>Hattie Hippo</td> <td></td> <td>03/07/13</td> <td>04/06/13</td> </tr> <tr> <td>101631503</td> <td>Book</td> <td>Rollback</td> <td>user 1</td> <td>03/07/13</td> <td>04/06/13</td> </tr> <tr> <td>101383271</td> <td>Electronic Resource</td> <td>Therapeutic advances in respiratory disease [electronic resource]</td> <td></td> <td>03/03/13</td> <td>03/31/13</td> </tr> <tr> <td>101284035</td> <td>Book</td> <td>Sweet Charlie, Dike, Cazzie, and Bobby Joe : high school basketball in Illinois</td> <td>March 3 Install</td> <td>02/28/13</td> <td>03/28/13</td> </tr> <tr> <td>95744412</td> <td>Book</td> <td>French lick : the possibility of widespread fraud involving historic tax credits has the development community turning scared. In: Shile weekly. Richmond, VA, vol.28, no.35 (Sept. 1, 2010), p. 11-12.</td> <td>Stacy Brunner</td> <td>11/02/12</td> <td>12/22/12</td> </tr> <tr> <td>95265720</td> <td>Book</td> <td>Another Zen mind, zen horse :</td> <td>Julie</td> <td>09/27/12</td> <td>10/25/12</td> </tr> </tbody> </table>	ID	Media Type	Title	Patron	Date Requested	Needed By	101631675	Book	Hattie Hippo		03/07/13	04/06/13	101631503	Book	Rollback	user 1	03/07/13	04/06/13	101383271	Electronic Resource	Therapeutic advances in respiratory disease [electronic resource]		03/03/13	03/31/13	101284035	Book	Sweet Charlie, Dike, Cazzie, and Bobby Joe : high school basketball in Illinois	March 3 Install	02/28/13	03/28/13	95744412	Book	French lick : the possibility of widespread fraud involving historic tax credits has the development community turning scared. In: Shile weekly. Richmond, VA, vol.28, no.35 (Sept. 1, 2010), p. 11-12.	Stacy Brunner	11/02/12	12/22/12	95265720	Book	Another Zen mind, zen horse :	Julie	09/27/12	10/25/12
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2	<p>Expand the “accordion” menus in the request as needed to review the request. Click Mark as received.</p>  <p>105565448 - Old Possum's book of practical cats</p> <p>Did you receive this item?</p> <p>Date received: <input type="text" value="06/17/13"/> Options: <input type="checkbox"/> Print Book Straps</p> <p>Mark as received <input type="button" value="Not Received"/></p> <ul style="list-style-type: none"> Request Details (Request ID 105565448) Lending Information (Supplier: NDT7P) Borrowing Library (NDCLV) Patron (Alisa Whitt) Request History Buy It Options 																																										
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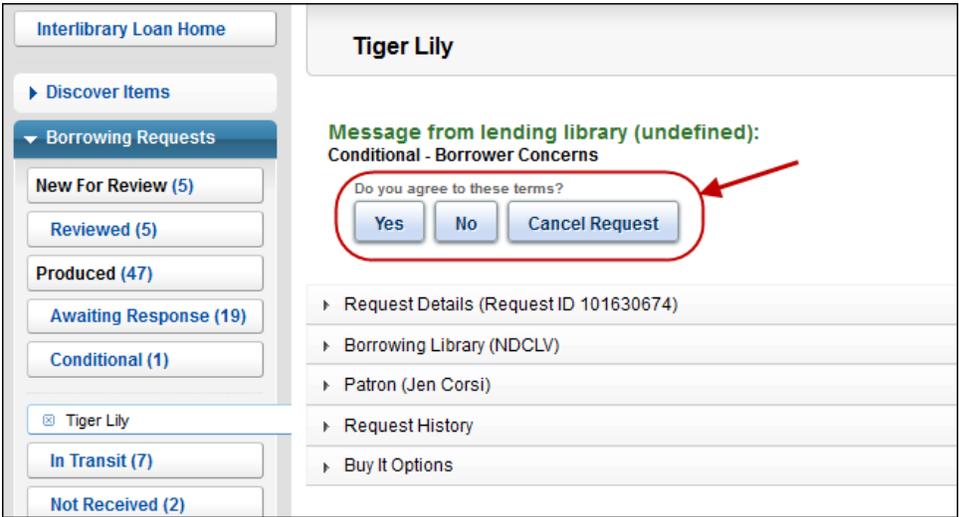
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Renew item (from Received Status)

Step	Action																																																																													
1	<p>From the Borrowing Requests category, click Received. Click the request ID or Title to display a request.</p>  <p>Borrowing Requests: Received (58)</p> <p>Batch return "Received" items</p> <p>Show 10 rows per page. Refresh Results 1-10 of 58 << first < prev 1 2 3 4 5 6 next > last >></p> <table border="1"> <thead> <tr> <th>ID</th> <th>Status</th> <th>Media Type</th> <th>Title</th> <th>Patron</th> <th>Date Requested</th> <th>Needed By</th> </tr> </thead> <tbody> <tr> <td>68673738</td> <td>Received/In Use</td> <td>Audio</td> <td>Educator's podcast guide</td> <td>Fred Dragon</td> <td>01/16/13</td> <td>02/15/13</td> </tr> <tr> <td>68673339</td> <td>Received/In Use</td> <td>Audio</td> <td>Death in West Wheeling</td> <td>Mike Veselenak</td> <td>01/10/13</td> <td>01/16/13</td> </tr> <tr> <td>68664762</td> <td>Received/In Use</td> <td>Audio</td> <td>Farm-fresh cats</td> <td>Fred Dragon</td> <td>01/03/13</td> <td>02/02/13</td> </tr> <tr> <td>68649550</td> <td>Received/In Use</td> <td>Audio</td> <td>The long winter /</td> <td>null</td> <td>12/21/12</td> <td>01/20/13</td> </tr> <tr> <td>68641930</td> <td>Received but Missing</td> <td>Audio</td> <td>Panda & polar bear</td> <td>null</td> <td>12/14/12</td> <td>12/28/12</td> </tr> <tr> <td>68640765</td> <td>Recalled</td> <td>Audio</td> <td>Scooby-Doo! Pirates ahoy!</td> <td>Fred Lego</td> <td>12/12/12</td> <td>01/05/13</td> </tr> <tr> <td>68640543</td> <td>Received but Missing</td> <td>Audio</td> <td>Four hungry kittens</td> <td>null</td> <td>12/12/12</td> <td>01/01/13</td> </tr> <tr> <td>68633540</td> <td>Recalled</td> <td>Audio</td> <td>TEST request</td> <td>Andy Cole</td> <td>12/07/12</td> <td>12/31/12</td> </tr> <tr> <td>68624655</td> <td>Received but Missing</td> <td>Audio</td> <td>A common loss</td> <td>NDWALU LOAN</td> <td>11/30/12</td> <td>12/30/12</td> </tr> <tr> <td>68556741</td> <td>Received but Missing</td> <td>Audio</td> <td>Bags, pillows, and pincushions: favorites from the editors of American Patchwork & Quilting</td> <td>Fred Dragon</td> <td>10/19/12</td> <td>11/18/12</td> </tr> </tbody> </table> <p>Show 10 rows per page. Refresh Results 1-10 of 58 << first < prev 1 2 3 4 5 6 next > last >></p>	ID	Status	Media Type	Title	Patron	Date Requested	Needed By	68673738	Received/In Use	Audio	Educator's podcast guide	Fred Dragon	01/16/13	02/15/13	68673339	Received/In Use	Audio	Death in West Wheeling	Mike Veselenak	01/10/13	01/16/13	68664762	Received/In Use	Audio	Farm-fresh cats	Fred Dragon	01/03/13	02/02/13	68649550	Received/In Use	Audio	The long winter /	null	12/21/12	01/20/13	68641930	Received but Missing	Audio	Panda & polar bear	null	12/14/12	12/28/12	68640765	Recalled	Audio	Scooby-Doo! Pirates ahoy!	Fred Lego	12/12/12	01/05/13	68640543	Received but Missing	Audio	Four hungry kittens	null	12/12/12	01/01/13	68633540	Recalled	Audio	TEST request	Andy Cole	12/07/12	12/31/12	68624655	Received but Missing	Audio	A common loss	NDWALU LOAN	11/30/12	12/30/12	68556741	Received but Missing	Audio	Bags, pillows, and pincushions: favorites from the editors of American Patchwork & Quilting	Fred Dragon	10/19/12	11/18/12
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2	<p>Expand the “accordion” menus in the request as needed to review the request. Click Renew item, and supply a Desired due date.</p>  <p>105490997 - The glass castle : a memoir</p> <p>Ready to return this item?</p> <p>Date returned: 06/17/13 Options: <input type="checkbox"/> Print Return Labels Desired due date:</p> <p><input type="button" value="Return item"/> <input type="button" value="Renew item"/> <input type="button" value="Lost"/></p> <ul style="list-style-type: none"> Request Details (Request ID 105490997) Lending Information (Supplier: NDT7P) Borrowing Library (NDCLV) Patron (Jonathan Birch) Request History Buy It Options 																																																																													
3	<p>A confirmation message appears and the request appears under the category Borrowing Requests > Received > Renewal Requested.</p>																																																																													

Respond to Conditionals from Lenders (from Produced Status)

Step	Action
1	<p>From the Borrowing Requests category, click Conditional. Review the Conditions column to see the lender's conditions. Then click the request ID or Title to display a request.</p>  <p>The screenshot shows the 'Interlibrary Loan Home' interface. On the left, there is a sidebar with 'Borrowing Requests' expanded, showing various status buttons: 'New For Review (5)', 'Reviewed (5)', 'Produced (47)', 'Awaiting Response (19)', 'Conditional (1)', 'In Transit (7)', 'Not Received (2)', 'Unfilled (18)', and 'Received? (3)'. The 'Conditional (1)' button is circled in red with an arrow pointing to it. The main content area displays 'Borrowing Requests: Conditional (1)' with a table of results. The table has columns for ID, Media Type, Title, Patron, Conditions, Date Requested, and Needed By. One row is visible with ID 101630674, Media Type (book icon), Title 'Tiger Lily', Patron 'Jen Corsi', Conditions 'Conditional - Borrower Concerns', Date Requested '03/07/13', and Needed By '04/06/13'.</p>
2	<p>Find the Lender's conditional message, then expand the "accordion" menus in the request as needed to review the request.</p>
3	<p>Respond to the Lender's condition with one of the options shown.</p>  <p>The screenshot shows the 'Tiger Lily' request details page. A message from the lending library is displayed: 'Message from lending library (undefined): Conditional - Borrower Concerns'. Below the message, there is a question 'Do you agree to these terms?' followed by three buttons: 'Yes', 'No', and 'Cancel Request'. These buttons are circled in red with an arrow pointing to them. Below the message, there are several expandable sections: 'Request Details (Request ID 101630674)', 'Borrowing Library (NDCLV)', 'Patron (Jen Corsi)', 'Request History', and 'Buy It Options'.</p>
4	<p>A confirmation message appears. If you replied Yes, the request is returned to the Lending library and appears under Lending Requests > Can You Supply? > Conditions Accepted. If you replied No, the request goes to the next Lender in the lender string. If you replied Cancel Request, the request is cancelled.</p>

E-mail a copy of a request

Send a formatted e-mail of the request details to any e-mail address using the **Email** button at the top right of any request screen.

Searching for requests

From the Interlibrary Loan Home screen, you may search active and closed requests by:

- Request ID
- Borrower Symbol
- Lender Symbol
- Author
- Title
- Article Title
- Patron Name

To search for requests:

Step	Action
1	Choose a search option from the drop-down list.
2	Type a keyword or number in the field provided.
3	Optional. Un-check the check box to deselect Active Requests or Closed Requests .
4	Click Go . The system responds with any matching requests.
5	Click a request.

Support

E-mail: support@oclc.org

Telephone: 1-800-848-5800 (USA) or

+1-614-793-8682

(7:00 am to 9:00 pm, US Eastern time, Monday–Friday)